

# **Schools Channel CRM**

## **October 27 Status Report (Version 1.0)**

### **Executive Summary**

#### **Overview**

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The Modernization Partner will provide functional support in the area of Customer Relationship Management (CRM) as follows:

- Represent the Schools Channel on the Enterprise Call Center Integrated Product Team (IPT) as a core team member.
- Assist the School's Channel in identifying "quick-hit" solutions and recommendations for implementation.
- Assist all Channels in the co-development of an enterprise storyboard to depict several "problem" student and school scenarios and design potential CRM solutions.

**Deliverables:** The deliverables for the sub-project are listed below:

- 19.3.1 Status Report - Monthly status reports delivered on-time and in the correct format to the General Manager of Schools.
- 19.3.2 Enterprise Storyboard and CRM Demo

#### **Project Status**

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Mod Partner representative has been integrated into the Call Center IPT, but hasn't been included as a core team member as of yet. Mod partner continues participating in Gap Analysis and Solution Generation activities.

The developing Quick Hits business case for software has been expanded to include support for development of an Institutional Record Concept, and a customer service concept of operations for the schools channel.

To support the business case development and the storyboards, Customer Process maps are being developed to clarify contact points, channels and reasons for customer interactions.

The purpose and content of the storyboards has been agreed upon, cases have been identified, and drafting of the Story Boards is in progress.

## Timeline

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September	October	November			
Integrate into Call Center IPT	Identify Story Board cases	Develop Story Boards			
Inventory Call Center Quick Hits	Generate synergy for CRM activities	Development of CRM business case.			
Develop Story Board Concept	Convey understanding of CRM as a business strategy				
Gain Understanding of CRM vision in School Channel	Development of Customer Process Maps				

### Timeline Legend:

Black = On track; Yellow = Potential Problem; Red = Scheduled Deployment At Risk

## Issues

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### *Resolved:*

The purpose and content of the story boards has been clarified.

### *Pending:*

## Deliverables Completed

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